First Unitarian of Albuquerque

Strategic Directions 2015-2020

Prepared December 2014

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Note: A one-page summary poster is attached to this report on the following page for convenience.

ACKNOWLEDGMENTS

The Strategic Planning Task Force would like to thank all who participated in this process. In particular, we would like to thank Marie Shriver, who graciously volunteered to provide the cover graphics, which have been incorporated throughout this plan. We are also very grateful for the guidance Angela and Christine, who lead us all with such strength of heart.
Over time, First Unitarian will become a “beacon of light” for social justice.

I. Strengthen existing, long-standing Social Justice efforts by broadening and deepening involvement throughout the congregation.

II. Enhance and leverage leadership experience within existing Social Justice programs and the Social Justice Council.

III. Refine and evaluate the process to select a Social Justice focus issue.

IV. Engage in strategic partnerships to broaden program impact.

V. Develop and encourage ways for First Unitarian to “walk our talk.”

First Unitarian will build an RE Program that is loved by our children and youth, highly valued by parents, and well-supported by the congregation.

I. Build up the staff and volunteer capacity of the RE program.

II. Tailor our RE program to meet the needs of 21st century families.

III. Strengthen connections between the sanctuary and the RE program.

IV. Improve Communications.

First Unitarian will provide year-round social bonding opportunities, especially during lulls in the program calendar.

I. Build a central repository for information and organizational support.

II. Develop standard procedures for starting new groups.

III. Provide year-round social bonding opportunities, especially during lulls in the program calendar.

IV. Enhance a culture of inclusion and action to initiate and support social bonds.

A variety of communication tools and comprehensive, updated information will be easily accessible to church members, leaders, and staff to assist in bringing together groups of all ages and interested in support of each other and the larger community in service of the mission of the church.

I. Improve the church website to function as an information clearinghouse for all church programs and activities.

II. Grow our knowledge and use of social media in support of church programs.

III. Invest in communications infrastructure to keep us up-to-date and effective.

Volunteer Development

First Unitarian will create a systematic approach to skills and leadership development and will teach each program to recruit, train, and manage volunteers.

I. Develop intentional volunteer training and management to support church programs and enhance individual skills.

II. Extend knowledge and training throughout the church.
INTRODUCTION

The Strategic Planning Task Force
The Board created the Strategic Planning Task Force in May 2014 to assist the congregation in creating a five-year strategic plan for 2015-2020. The Task Force consists of three board representatives and three non-board members of the congregation. The Board chose members to balance skills in big-picture thinking, publicity, and project and event management. The Rev. Angela Herrera worked with the Task Force, except during her sabbatical, during which the Rev. Christine Robinson stepped in to assist.

<table>
<thead>
<tr>
<th>Board Members</th>
<th>Non-Board Members</th>
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<tbody>
<tr>
<td>Dimitri Kapelianis</td>
<td>Mikaela Renz-Whitmore</td>
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<tr>
<td>(co-chair)</td>
<td>(co-chair)</td>
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<tr>
<td>Diane Flynn</td>
<td>Nissane Capps</td>
</tr>
<tr>
<td>John Kwait</td>
<td>Mary Colton</td>
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The Board’s Charge to the Strategic Planning Task Force
The Board charged the Task Force to work with the congregation, via forums and other events, to develop a five-year strategic plan (to cover the years 2015-2020) and present it at the 2015 Annual Meeting. The plan is to include proposals for strategic directions, as well as the key assumptions and conditions presumed in the plan.

Based on advice from Stefan Johansen, an expert on effective strategic planning in large Unitarian churches, the Task Force followed a model of strategic planning that starts with a series of “hunches” about what might be the most important issues facing the congregation and tests them in a series of conversations with the congregation and staff. The goal is to build on strengths and opportunities present to us now, rather than brainstorming from a blank slate.

The Task Force synthesized feedback from the congregation into proposals for strategic directions that were developed in consultation with the ministers and Director of Operations. While the Board directed the task force not to be overly limited by financial concerns, any financial implications were to be noted in the final report.

Strategic Planning Parameters
The Board also specified two constraints to the scope of the Strategic Plan.

1. One of the biggest changes that this congregation will face in the five-year period covered by this Plan is a ministerial transition as the senior minister retires, and a new ministerial team is chosen and formed. The Board is charged with preparing for this transition and will be working directly with the congregation on this matter. This process will be open and transparent, and it will take considerable energy. While this Strategic Plan acknowledges this transition, the strategic directions are distinct from this change.
2. This congregation just completed a successful capital campaign to construct our beautiful new sanctuary. While there may be future capital projects that are needed to accommodate our continued growth, the Board directed the Task Force to project any goals that involve a major building campaign beyond the five-year mark. While no major building projects came up during discussions with the congregation, it should be acknowledged that the Task Force directed the congregation to focus on smaller-scale changes that could improve our church without involving a major capital campaign.

Additionally, the Task Force focused its work by noting that there are many activities that take place at the church that will not appear in the Strategic Plan—Sunday worship services, for example. It is assumed that these vital activities will continue to take place, but new strategic directions are not needed for them to be successful and effective.

The Planning Process
The Task Force began meeting regularly in June 2014 and performed an initial assessment of the church’s strengths, weaknesses, opportunities, and threats. From this analysis, the Task Force identified four focus areas for the church’s energy over the next five years:

1. **Religious Education**: Supporting the faith development of youth and adults and nurturing their bond to the UU faith through RE Programs.
2. **Social Bonds**: Enriching the opportunities for meaningful personal connections within a large church.
3. **Social Justice**: Taking action in the broader community to make the world a better place.
4. **Communication Technology**: Using our gift for technology and innovation to extend the benefits of our congregation to others.

In September, the Task Force met with many groups within First Unitarian with expertise and important perspectives in one or more of the focus areas above. Groups added to the discussion of the church’s strengths and weaknesses, and the Task Force asked groups what they wanted to see in place in five years in terms of the focus areas that were relevant to each group. These early meetings validated the initial hunches, and participants provided potential priority actions within each relevant focus area that might move us closer to where we want to be as a church in five years. The following groups were included in these early meetings:

- LEAD (Leadership Enrichment and Development) Team
- First Unitarian Staff
- UU Camp
- Mapalos Extended Family
- Penguins Extended Family
- Wednesday Potluck
- RE Council
- Lead Donors Event
- Membership Committee
- Adult RE
- RE Parents
- iMinistry (via email)
- East Mountains Branch
- Social Justice Council
Based on these early meetings, the Task Force prepared posters and handouts for several Town Hall meetings, which were held in October. These meetings – held over the lunch hour on a week day, a weekday evening, and on a Sunday afternoon – allowed participants to learn about the strategic planning process, weigh in on the initial focus areas, and provide feedback about priority actions that had been suggested as well as adding new suggestions. The Task Force left posters and post-it notes available in the Social Hall over two Sundays to allow everyone to review others’ thoughts and add their own.

These Town Halls added a new focus area for priority actions:

- Volunteer Development.

Participants spoke of a desire to be more intentional about leadership succession within the church in terms of generational transitions, but there was also discussion of skill development to help support all groups to be more effective in their work.

In November and December, the Task Force met to synthesize and vet the ideas gathered throughout the process and begin to shape them into a strategic plan. Task Force members consulted with groups and/or individuals as needed to clarify and refine ideas within each focus area and worked with Angela and Christine to test the practicality/feasibility of implementing priority actions.

The Task Force noticed that three of the focus areas were “programmatic,” i.e., ends to be achieved in their own right, while two of the focus areas were “foundational,” i.e. the means to achieve other ends.

The programmatic focus areas are:

- Religious education,
- Social bonds, and
- Social justice.

The foundational focus areas are:

- Volunteer development and
- Communication technology.
Mission and Vision

The five-year vision described by this strategic plan is to strengthen the effectiveness and reach of several key areas that serve our church, its mission, and our congregation -- Religious Education, Social Bonds, and Social Justice -- and two focus areas that provide a foundation in service of the church as a whole -- Communication Technology and Volunteer Development.

First Unitarian has enjoyed a sustained period of growth: since the development of our last strategic plan in 2010, we have added members, staff, and a new sanctuary. These are successes to celebrate. However, conversations with the various communities consulted by the Strategic Planning Task Force also revealed the sense that First Unitarian is now faced with the challenges and opportunities commensurate with being a large congregation, as defined by the Unitarian Universalist Association of Congregations, while still often relying on the structures and processes developed for a mid-sized church. There is a desire to integrate new members, start new groups, strengthen existing programs, and, going forward, develop more intentional ways of organizing our many groups and communicating with each other. This may include developing overarching, systematic structures and processes. In this sense, the five-year plan developed by the task force has an emphasis on strengthening what we already do rather than on embarking upon many new strategic directions.

It is also worth noting the extent to which this strategic plan is consistent with our mission covenant at First Unitarian. All three of the programmatic focus areas identified in the plan correspond with an element of our mission covenant. Specifically:

<table>
<thead>
<tr>
<th>Programmatic Focus Area</th>
<th>Mission Covenant</th>
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<tbody>
<tr>
<td>Religious Education:</td>
<td>Provide a dynamic religious education program for all ages</td>
</tr>
<tr>
<td>Social Bonds:</td>
<td>“Minister to each other in an atmosphere of welcome, acceptance, and caring.”</td>
</tr>
<tr>
<td>Social Justice:</td>
<td>“Be a positive force for social, environmental, and economic action.”</td>
</tr>
</tbody>
</table>
STRATEGIC DIRECTIONS FOR CHURCH PROGRAMS

Religious Education for Children and Youth
Supporting the faith development of our children and youth and nurturing the bond to our shared faith through Religious Education (RE) programs is one of the most important things that we do as a church. There are several adjunct programs, such as “Our Whole Lives” (or OWL) and Summer Camp, that are highly popular and successful. Summer Camp, in particular, integrates music, rituals, and leadership development into its structure and could provide a great source of vitality and be a model for the Sunday RE program. Two choirs – one for younger and one for older children – have recently been started and should help integrate children and music into the life of the congregation. The Coming of Age service is an important milestone and much beloved by the congregation. We have a core of deeply committed people who volunteer in the Sunday RE program and a large RE building that can accommodate many activities.

However, the RE program faces many deep challenges. There are children and youth who are not involved in the Sunday RE program in any way, which raises the question of whether the program does not serve their needs or meet their expectations or whether attending RE on Sunday mornings isn’t worth it compared to the many priorities that modern families must balance. The Director of Education position has turned over three times in the last five years. Each change of DRE has been associated with a change in the curriculum. The RE program relies on a large volunteer force. Communication between the RE parents, volunteers, and RE staff has often been poor. Parents, the primary source of our volunteer force, have often had negative experiences and are reluctant to volunteer again. The RE program is not well-integrated into the spiritual life of the church. Many parents feel that children are not welcome in the sanctuary, and many church members without young children are unaware of the needs of the RE program. In sum, there is a widespread sense of unease around the RE program. The RE program needs sustained investment of our resources over the next five years. If we fail to connect our
children to the UU faith, they may well drift away, with harmful results for the future strength of our Church.

**Recommendations**

There are four strategic priorities to pursue: build up the staff and volunteer capacity of the RE program, reimagine an RE program for the 21st century, strengthen the connections between the sanctuary and the RE program, and improve communications at all levels, so that in five years we have a thriving, dynamic, RE program that is a central pillar of the First Unitarian Church.

I. **Build up the staff and volunteer capacity of the RE program.**

*While the RE program needs major restructuring and commitment of resources over time, there are immediate steps that can be taken to improve the program in the short term.*

**Potential Actions**

1. Develop and support the efforts of an energetic, visionary DRE with strong management and communication skills.
2. Rebuild the volunteer force by providing a range of meaningful volunteer opportunities and the tools to do a good job.
3. Improve communications with parents, teachers, youth, children, and RE staff.

II. **Tailor our RE program to meet the needs of 21st century families.**

*In order to work better for busy families, an RE program needs to include a sense of purpose and progression while not requiring attendance every week. The program needs to plan for intentional transitions between grade levels, connections among age groups, and opportunities to grow as leaders. In addition, RE should teach a range of spiritual rituals that children can draw upon throughout their lives, such as meditation and vespers.*

**Potential Actions**

1. Develop a series of steps with badges or ribbons to mark children’s progress along a spiritual path to learn the UU faith and their own beliefs.
2. Engage children and youth through a robust annual calendar of events, overnights, and activities.
3. Integrate Summer Camp culture and leadership development.
4. Establish a schedule for children’s chapel services in the RE building.
III. **Strengthen connections between the sanctuary and the RE program.**

*We need to fully integrate our children into the life of the congregation and build a culture committed to investing in the development of the next generation of UUs.*

**Potential Actions**

1. Implement a sustained communications campaign to ensure that children and families feel welcome in the sanctuary.
2. Synchronize the RE curriculum and activities with the church sermon and calendar.
3. Incorporate rites of passage for younger ages into sanctuary services (e.g., chalice lighting, reciting the Seven Principles, etc.).
4. Offer regular family rituals in the RE building.
5. Tap the energy, enthusiasm, and talents of the broader congregation to contribute to the RE program.

IV. **Improve Communications.**

*Parents need to know what their children are learning and how to support their growth, volunteers need to know how they can meaningfully contribute, and the broader congregation needs to know how the RE program fits into the life of the church.*

**Potential Actions**

1. The DRE becomes the central hub for communication to parents, volunteers, and the congregation.
2. Information about the entire RE program – its overall progression, curriculum for each grade level, and operational needs and procedures – is available online and communicated in person on a regular basis, especially at the start of each school year.
3. Technology is used to build the social bonds of the RE community (e.g. Facebook groups, meet-up pages, and the church website).
4. At the start of each school year, the DRE communicates with La Amikoj about volunteer opportunities throughout the year, and La Amikoj decides what role to take in RE for younger children and other church events.
Social Bonds

Social bonds are critical, especially in a growing congregation. Feeling a sense of belonging to small, intimate groups and social networks is crucial to church health and growth, to leadership development, and to the emotional health of church members and friends. Intimate groups, such as Covenant Groups, allow for exploration of deep issues with the same members over a period of months, allowing for trust to build. Extended Families allow for members to come together around a common connection that grows over years. Social events, such as Wednesday Potluck, dances, and the social hour allow individuals to meet a broad spectrum of new people.

While there is currently a core of great programming at First Unitarian to support social bonds, there is room to do more. Especially considering our rapid growth, offering opportunities for members to form and maintain intimate connections within a large church should be a major focus. A new generation may be more motivated to attend one-time events and “meet ups” rather than joining a group, and the church should broaden its range of offerings to respond to this and other emerging trends over time.

Recommendations

There are two main focus areas of creating and supporting social bonds. First, it is essential that processes and resources are in place at the institutional level. Second, members and friends of First Unitarian must enhance a culture of inclusion and action to take it upon themselves to initiate and support bonds.

I. Build a central repository for information and organizational support.

*Many members and potential members use technology or look to a central figure to find out what opportunities to connect exist, to find where they might fit in. As our church continues to grow, resources need to be in place to allow easy access to information.*

Potential Actions

1. Conduct a yearly audit of programs and update relevant information.
2. Create a comprehensive method(s) to access church activities:
   a. Improve website architecture and hierarchy to organize social opportunities.
   b. Provide a searchable index and calendar of group meetings and events.
   c. Make group contact information more accessible.
   d. Offer avenues for advertising for groups wishing to recruit new members.
3. Consider staff realignment and/or volunteer efforts to address social bonds:
   a. Engage the LEAD (Leadership Enrichment And Development) Team to supplement and leverage staff efforts.
b. Spend more time interacting with existing groups to stay current on the breadth of church programs and intentionally referring new and existing members to groups and events that interest them.
c. Provide more assistance in the beginning of new group formation.
d. Assist in documenting group procedures.
e. Organize and recruit members to organize one-time events (i.e. “meet ups”) to involve younger church members and those interested in low-commitment social interactions.

II. Develop standard procedures for starting new groups.

Many do not know how to start a new group at First Unitarian. This might include a brand new idea, “passing the baton” to start up a new Extended Family if one is full, or reviving a group that might have existed in the past.

Potential Actions
1. Create standard procedures and church support for new group formation.
2. Link experienced mentors with mentees to pass wisdom gained from experience.

III. Provide year-round social bonding opportunities, especially during lulls in the program calendar.

Traditionally, Connection Sundays in early fall have been the start of the program year for activities at First Unitarian. Groups are available to join, and there are many opportunities from fall to spring. A result is that those first joining First Unitarian in the summer or those who miss Connection Sundays have fewer opportunities to make connections and join groups.

Potential Actions
1. Provide digital means to express interest in new or existing groups and track the status of waiting lists for closed or time-limited groups (i.e., extended families and covenant groups).
2. Look for opportunities to supplement the church’s annual program calendar with one-time activities and events and low-commitment or time-limited groups:
   a. Offer mini covenant groups throughout the year, particularly over the summer.
   b. Program some events or group activities over the summer and during other lulls in the program year.

IV. Enhance a culture of inclusion and action to initiate and support social bonds.

While many Unitarian Universalists are either introverted or hesitant to be “joiners,” we must all take responsibility for “being the change we wish to see in the world.” No matter how much support and infrastructure the church provides, if members do not take action to make connections, social bonds will not be made.
Potential Actions

1. Cultivate a culture of joining – invite others to groups you attend, make a plan to sit in the sanctuary with others on Sunday, ask a friend to go to a new group with you.
2. Volunteer your services and skills – bonds can be made while serving a cause.
3. Organize events and/or opportunities to interact with multiple groups from a similar theme, such as an All Extended Families Gathering or Large Covenant Group Meeting.
4. Organize and participate in activities across generations.
Social Justice

At the heart of several of our Seven Principles, Social Justice — or taking action in the community to make the world a better place — is a cornerstone of who we are as Unitarian Universalists and people of faith.

First Unitarian has more than 20 groups that provide food, tutor neighborhood children, contribute to affordable housing, improve the environment, offer ESL classes, seek economic justice, and more. The church created a Social Justice Council as an umbrella organization to nurture the activities and overall direction of a wide array of groups taking action in the community and to promote systemic change.

The Social Justice Council has begun to involve the congregation in a series of social justice campaigns — or efforts committed to a goal over a focused period of time and organized around a particular theme. A focus on “homelessness” was presented to the congregation at the January 2014 Annual Meeting. The Council hopes to leverage individual efforts by organizing, focusing, and building on the ideas and energies from forums, sermons, RE curriculum, and events.

In order to create successful and effective campaigns, the Social Justice Council will need to test and refine a process to select a focus, soliciting strong support from church leaders, engage a larger cadre of committed congregational volunteers, build leadership among them, and seek resources. Building this capacity will enable First Unitarian to engage in Social Justice work that creates change at multiple levels.

There are many members deeply committed to these social justice efforts and very active in many groups. Even so, the church has an opportunity to take a more intentional and proactive approach to strengthening the commitment to social justice among members of all ages and moving the congregation toward action on multiple fronts and to leverage our efforts toward greater impact on the changes we would like to see in the world. Toward this end, we could explore ways to recruit volunteers, particularly among newer members, as well as opportunities to partner with other social justice organizations working in the community.

Social Justice Vision

Over time, First Unitarian will become a “beacon of light” for social justice. In five years, in addition to supporting a robust range of social justice groups, we will have the capacity to launch and successfully complete one large, focused social justice campaign at a time. Individuals across generations will work together to put principle-based faith into action. Finally, we will offer our support and resources in partnership with other social justice organizations doing important work in the community.
**Recommendations**

There are five strategic priorities to pursue: strengthen existing social justice efforts that demonstrate member commitment and social impact by broadening and deepening involvement throughout the congregation, enhance and leverage leadership experience to increase the effectiveness of our social justice work, develop the capacity to lead a large-scale social justice campaign that is focused on a single issue and is designed for maximum impact, partner with community organizations to engage strategically in social justice efforts, and integrate social justice efforts throughout the life of our congregation.

I. **Strengthen existing, long-standing Social Justice efforts by broadening and deepening involvement throughout the congregation.**

*Existing social justice efforts offer a broad range of work in which our congregation can engage. More church members could be involved in existing efforts, particularly newer church members, and the impact of social justice efforts could be enhanced by coordinating and leveraging multiple groups’ events.*

**Potential Actions**

a. Create innovative strategies and regular and ongoing efforts to engage newer church members in existing Social Justice work.

b. Collaborate with the Youth RE Program to provide youth experiences in faith-based justice work.

c. Connect existing Social Justice projects in ways that create greater impact (i.e. Celebrating Citizenship attainment for an ESL student at a Tutoring Program parent potluck).

II. **Enhance and leverage leadership experience within existing Social Justice programs and the Social Justice Council.**

*Existing groups contain much leadership experience and potential, which should be cultivated and extended to others in the congregation. In this way, our social justice work will continue to be more effective over time, and our efforts can build on each other to have more impact in the community and effect more of the change we want to see in the world.*

**Potential Actions**

a. Provide scholarships to UUA’s General Assembly, as well as video participation, for adults who will covenant to share transformative experiences with the congregation.

b. Provide scholarships for youth to UUSC’s College of Social Justice, with the same covenant so a “multiplier effect” is realized.

c. Identify and capitalize on the social justice expertise of church members.
III. **Refine and evaluate the process to select a Social Justice focus issue.**

*In addition to our ongoing social justice work, our congregation has the ability to take on a social justice issue and effect change through a focused, time-limited campaign, which can organize and maximize the impact of our efforts. In order to be effective, the Social Justice Council, ministers, and the congregation will need to learn more about how to develop and execute a social justice campaign.*

**Potential Actions**

a. Use the pulpit and publications to make the congregation aware of and encourage participation in Social Justice forums.

b. Establish criteria and process for selecting a Social Justice issue for a time-limited, focused effort.

c. Develop an action plan to support a focused Social Justice effort.

d. Develop an environment that engages church members, especially newer members, in focused Social Justice work.

e. Collaborate with Youth RE on each Social Justice focus issue.

f. Incorporate benchmarks into the action plan in order to evaluate progress toward goals and establish criteria to define the endpoint of a campaign.

IV. **Engage in strategic partnerships to broaden program impact.**

*One way First Unitarian can broaden its impact on social justice in the community is by partnering with other organizations already doing good work in the world. In addition to sharing our resources on campus, we can offer more social justice experiences to our members with minimal effort and resources by coordinating work with other organizations. Particularly when it comes to social justice campaigns, partnerships can help leverage and maximize the effectiveness of our efforts and increase our reach into the community.*

**Potential Actions**

a. Identify and contact organizations doing work in the community that aligns with our social justice mission to explore potential partnerships.

b. Partner with other organizations, as appropriate, to gain greatest impact on existing efforts, other organizations’ good work in the community, or social justice campaigns.

c. Share information about resources available on campus for community organizations that may benefit.

V. **Develop and encourage ways for First Unitarian to “walk our talk.”**

*Words are powerful forces of creation. They take our dreams and goals and put them out there for all the world to witness. First Unitarian should strive to ensure that its own actions are consistent with the social justice goals that it advocates.*

**Potential Actions**

a. Explore the feasibility of supporting a community garden in a near-by apartment complex.
b. Reduce the congregation’s environmental footprint by publicizing bike and bus routes, decreasing use of paper products, and expanding space for low-emission vehicles, promote car-pooling.

c. Offer to mentor other churches.

d. Speak more directly to the challenge of climate change and make it part of the way we think and live our lives.
STRATEGIC DIRECTIONS FOR FOUNDATIONAL EFFORTS

Volunteer Development

Because the church is built on its shared ministry, and has the staff and financial limitations of any church, First Unitarian runs on volunteers. Much of the work is under the radar, done by people who sign up and show up regularly to tend to their assigned tasks.

The Leadership Succession Committee seeks individuals to fill specific leadership roles as positions open on the Board or standing committees of the church. These leaders often bring experience and skills from employment or community activities that have prepared them to be Board officers, financial chairpeople, or committee heads. The LEAD (Leadership Enrichment And Development) Team, chaired by the Membership Development staff person, helps to develop leadership skills and support the efforts of the heads of the church’s programmatic groups (Covenant groups, Extended Families, Earthweb, Wednesday Potluck, etc.).

Between the quiet workers and the experienced leaders are the many people who might like to volunteer if given some training and encouragement. Many church members expressed a desire to be more intentional in leadership and volunteer development over the next five years.

Many of our existing groups, such as After School Tutoring and Covenant Groups, provide excellent models for volunteer orientation, instruction, and management. These models could be used as guides in developing the training for other volunteer opportunities.

Volunteer Development

Vision

Developing skills and leadership in people is as important as building capacity to do the work needed for church programs and administration. First Unitarian will create a systematic approach to skills and leadership development and will train each program to recruit, educate, and manage volunteers.

While volunteer recognition events are important, the goal should be that volunteering has intrinsic rewards in making intergenerational connections (RE), wider acquaintances and friendships (Social Bonds), and greater awareness and contributions to the larger community (Social Justice). Successful volunteers should be pleased with their own development and their contribution to the health of their church.
Recommendations

I. Develop intentional volunteer training and management to support church programs and enhance individual skills.

The LEAD Team supports our long-standing leaders and helps raise new ones from our congregation. But not every member wants to be developed into a leader; many would prefer to volunteer their time and energy to First Unitarian without the obligation of leadership. Therefore, we need to enhance our intentional volunteer training in the dual beliefs that our church thrives when it has a vibrant pool of volunteer talent to draw upon and that service to a greater good is valuable for the spiritual development of volunteers.

Potential Actions

a. Leverage the Membership Development and LEAD Team to coordinate “train the trainers” workshops.

b. Target trainings to the skills needed for particular roles.

c. Develop mentors to guide new programs and orient new volunteers over time.

d. Document training procedures and materials online.

II. Extend knowledge and training throughout the church.

Like most churches, we are good at training volunteers and leaders in the short-term, but there is no overarching, systematic, intentional skills training or leadership development. Particularly as leaders change over time, and new generations become integrated in all aspects of the church, there should be a system for continually building skills and developing leaders.

Potential Actions

a. Create a systematic approach to churchwide training, leadership development, and generational leadership succession; and provide oversight.

b. Ask those who attend outside learning opportunities – General Assembly, College of Social Justice, etc.) to return and “multiply” their experiences by sharing with others in the church.

c. Cultivate the ability to conduct occasional services and program activities in Spanish.
Communication Technology

Technological know-how and openness to innovation are big strengths of this congregation, from our early adoption of a website to our branch ministries and our use of social media. Over the next five years, technology will be key to improving communication and information sharing via the website and social media.

We have the ability to extend our worship service to our branches, to discussion groups, and to individuals throughout the world. Growing our capacity to use technology to support church programs and mission will require investment over time – both financial and human.

Recommendations

I. Improve the church website to function as an information clearinghouse for all church programs and activities.

First Unitarian is a vibrant congregation with many programs, activities, and groups. The ability to easily find information about all our offerings is central to the continued work of our church. Access to information helps programs run more smoothly, connects members to each other, and helps new members form bonds to our faith and our community.

Potential Actions

1. Document and post procedures and “how-to” information for forming and joining new groups.
2. Create a procedure to update online content on a cyclical basis.
3. Provide search functions for calendars, room scheduling, group meetings, contact information, etc.

II. Grow our knowledge and use of social media in support of church programs.

As the iMinistry team feels that it has all that it can do on its plate now, we will need to grow our technology capacity with the use of volunteers that can teach specific topics and recruitment efforts.

Potential Actions

1. Provide volunteer-led trainings on the use of social media for church programs and groups and specific technologies (i.e., Google Docs, Dropbox, Facebook, etc.).
2. Explore ways to strengthen iMinistry, e.g., through recruiting volunteers or adding a dedicated staff person in the future.
3. Explore intergenerational opportunities to engage in social media.
III. **Invest in communication infrastructure to keep us up-to-date and effective.**

*First Unitarian values technology and the power it gives us to extend our reach into the world. We have invested wisely in communication infrastructure in the past, and we need to continue to budget upgrades that will allow us to maintain our commitment to the branches, extend our programs to housebound seniors and others online, enhance our revenue stream from rentals and events, and support other innovative initiatives over time.*

**Potential Actions**

1. **Budget regular upgrades for sound and video recording equipment in the sanctuary and audio/visual capability in the Social Hall, Memorial Hall, and RE building.**
2. **Invest in audio/visual technology to better connect the branches to the main campus and to each other.**
3. **Update presentation hardware and software to enable innovative services, broaden the market for rental opportunities and events, and provide real-time Spanish translation.**
NEXT STEPS

General Dwight D. Eisenhower is credited for saying, “Plans are nothing; planning is everything.” The strength of this strategic plan lies in providing a snapshot of the thoughts, perspectives, energy, and passion of those who participated in the process. The extent to which the strategic plan is implemented will depend, in large measure, on the continued efforts of staff, congregational leaders, and motivated members. It is fully expected that many ideas in this plan may prove infeasible or unhelpful over time. The Task Force approached this strategic planning effort as one of getting the lay of the land – the issues and opportunities that lie before us – and offering many seeds of ideas. Those that gain support and enthusiasm will bloom; those that do not take root will wither, and we can save the water for those that are more hardy!

That said, any substantial efforts will likely begin after Christine’s sabbatical. The Board, ministers, and staff are expected to take the lead in developing priorities and initiating the first implementation steps. Church leaders and the wider congregation will be key in energizing efforts to realize the visions of each focus area and sustaining positive change over time.

The Task Force recommends that the strategic plan be assessed informally in 6-12 months so that any minor adjustments can be made and evaluated halfway through the planning horizon to allow time to re-direct and/or reprioritize efforts and reallocate resources to better achieve important outcomes. The Task Force could be reconvened for this purpose, or a different working group could be assembled.